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System for Administration, Training, and Educational Resources for NASA

Brio Intelligence Explorer 6.6.4 Basics

Presented by:
Jason Nelson, PHR
Human Resources Development Branch

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Objectives

At the conclusion of this class, the student will be able to:

1. **Create a Training History by Learner report.**
2. **Create a Training History by Organization report.**
3. **Create a History Export report.**
4. **Export Brio reports to Excel.**
5. **Save a report in Brio, including the query and results.**
6. **Place limits on data and use sorting to create ad hoc reports.**
7. **Create a pivot table to summarize data and perform mathematical functions relating to training expenditures, training instances, etc.**
8. **Create a chart or graph from an existing pivot table.**
9. **Create a custom chart/graph using results from the query.**
10. **Identify other useful reports.**

Step 1: Login to Brio Intelligence 6.6.4
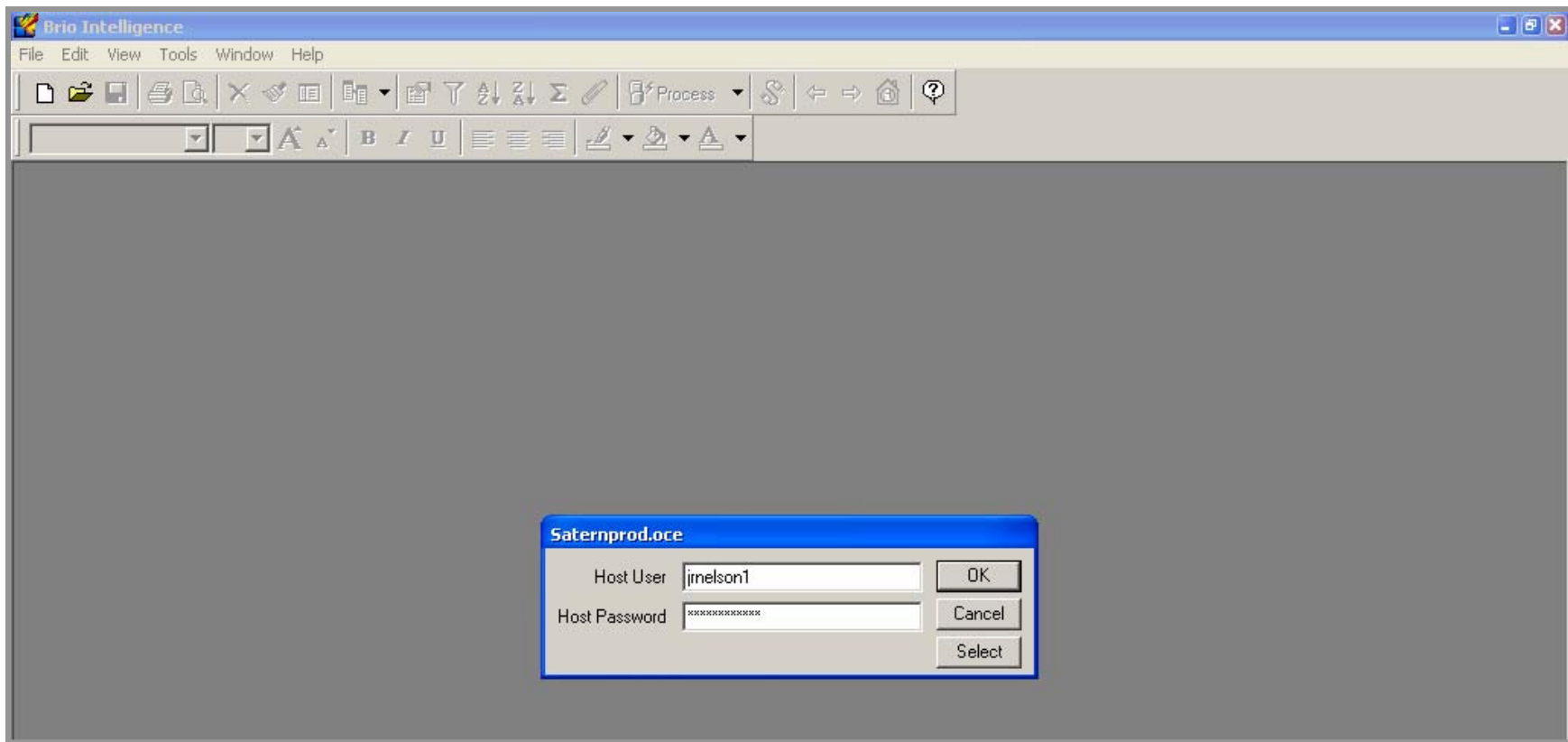
Step 2: Click **File > Open from Repository > Saternprod.oce**
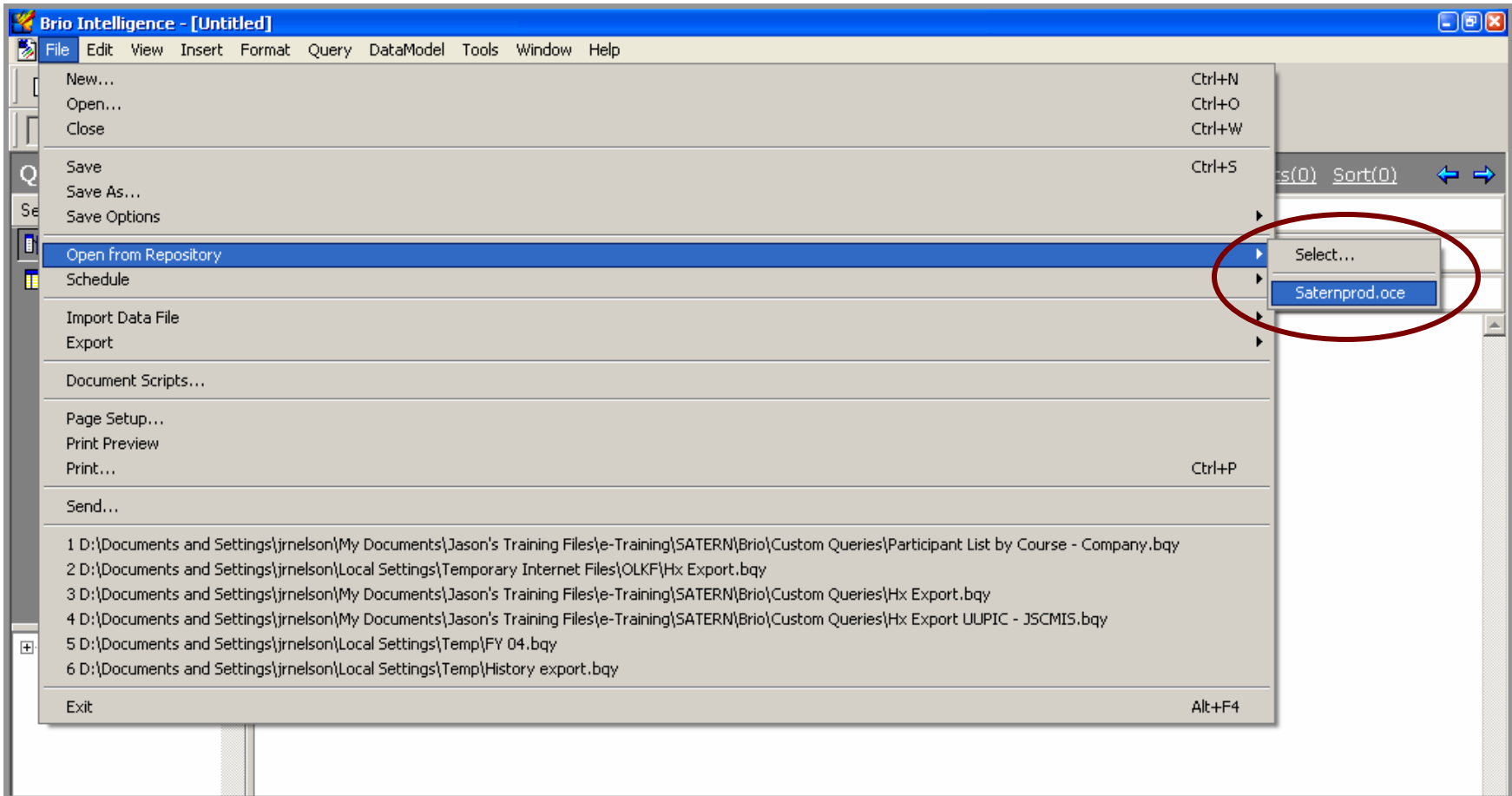
Step 3: Open **Training History by Learner**

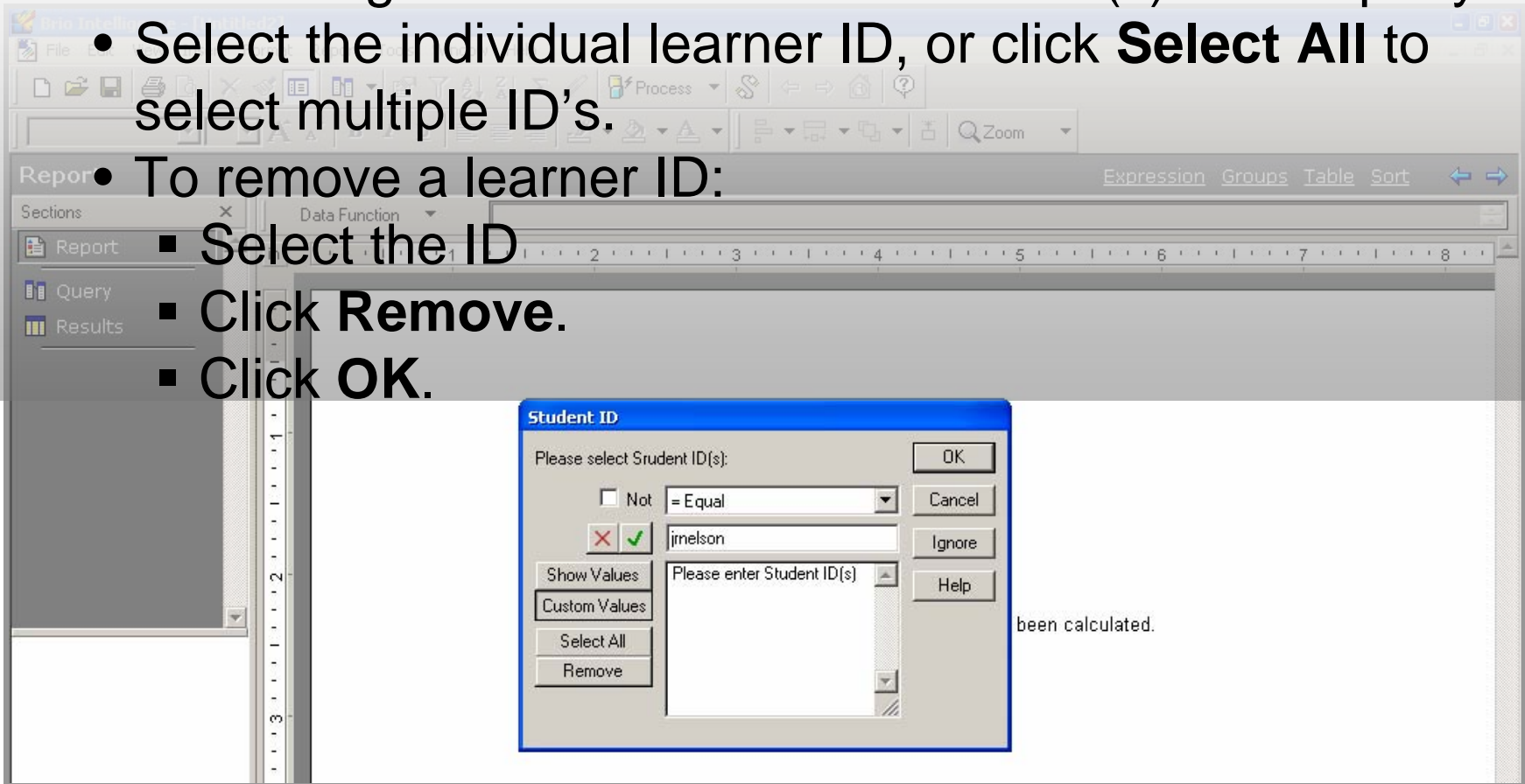**Step 4:** Click on **Process pull down menu** and select
Process All.
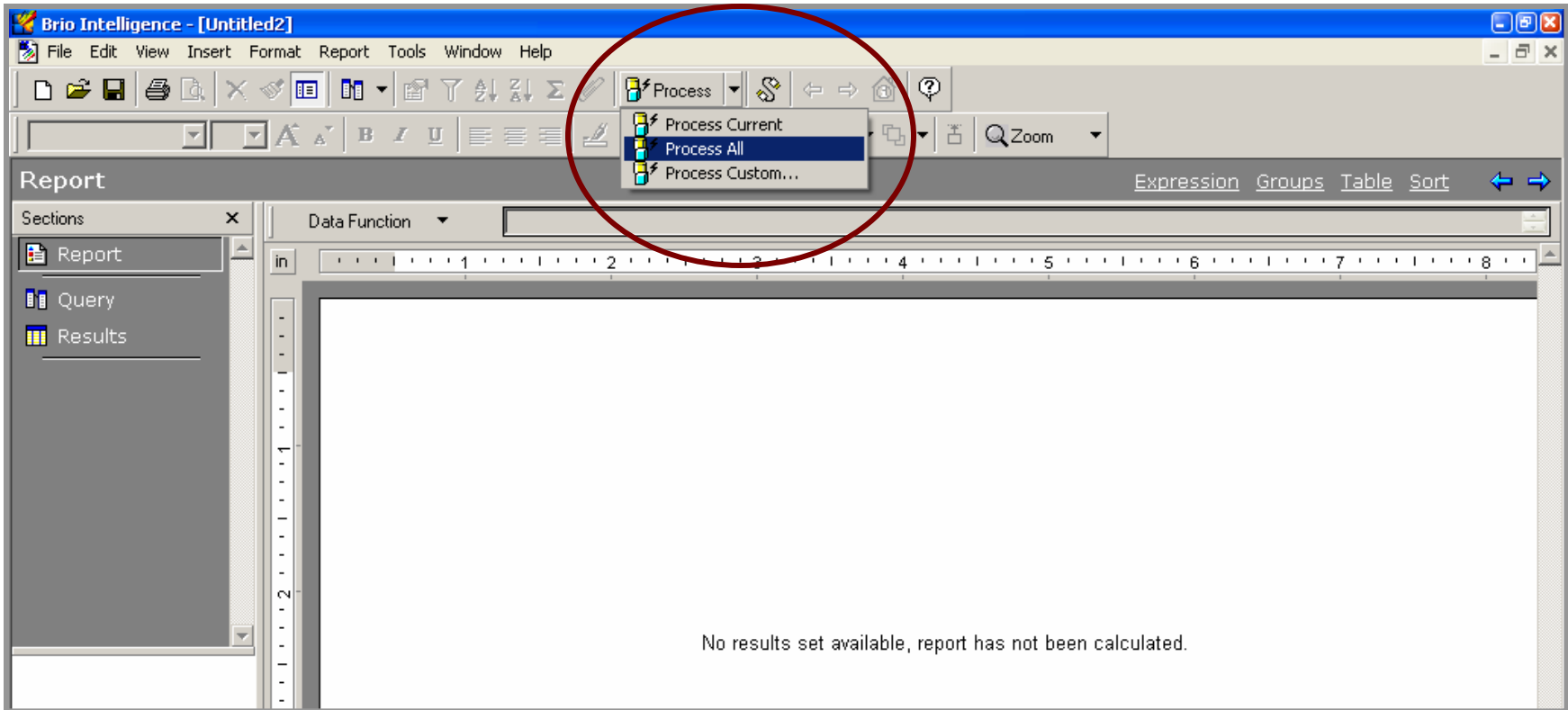
Step 5: Choose Learner ID(s).

- Click on **Custom Values** then, type the learner ID.
- Click the green check to add learner ID(s) to the query.
- Select the individual learner ID, or click **Select All** to select multiple ID's.
- To remove a learner ID:
  - Select the ID
  - Click **Remove**.
 - Click **OK**.

Step 6: Select Start/End Completion Dates.
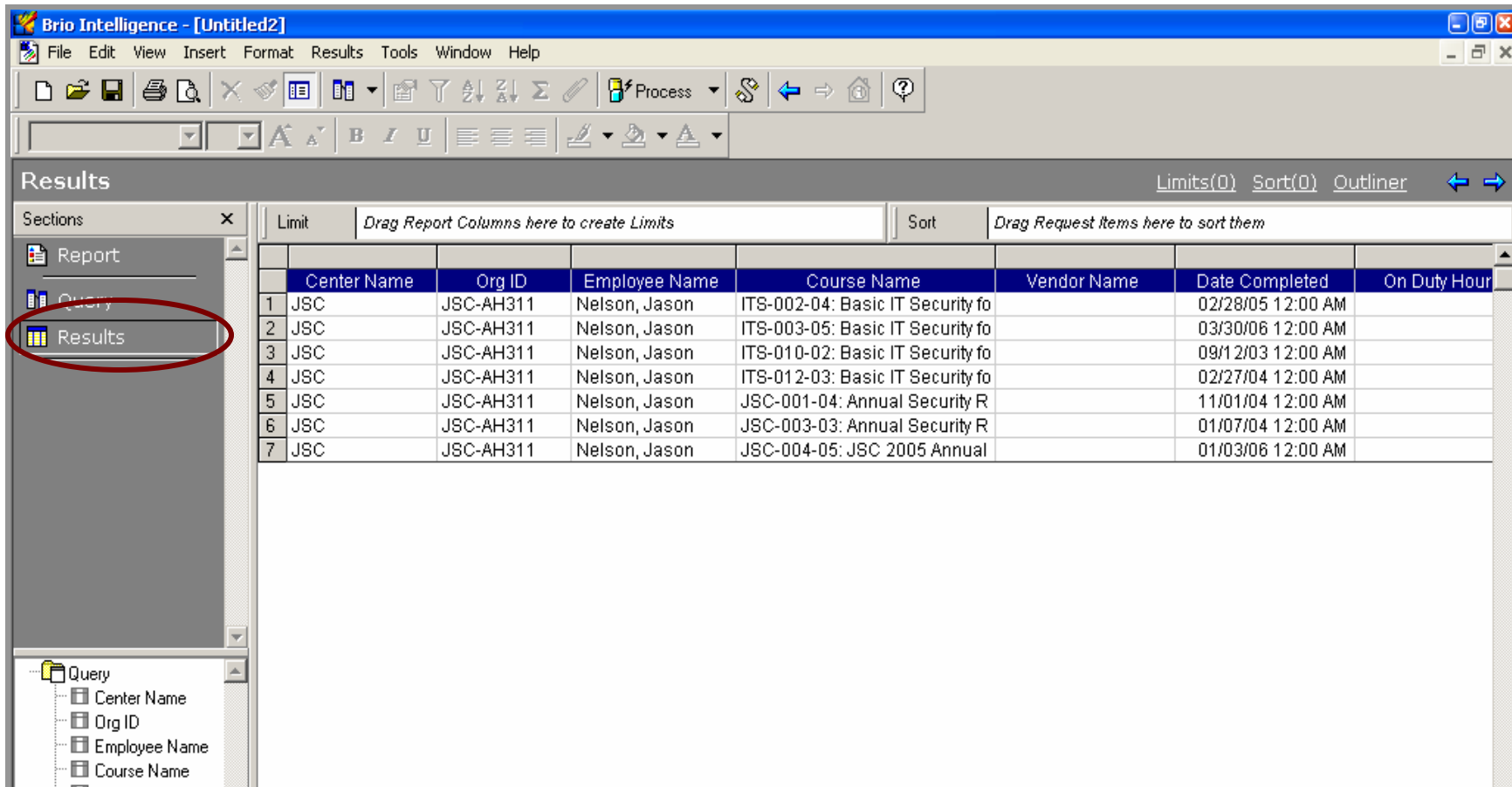
- To get a complete history, do not enter any dates. Instead, click **Ignore**.
- To limit the report by date:
  - Type the start date, and click the green check.
  - Type the end date, and click the green check.
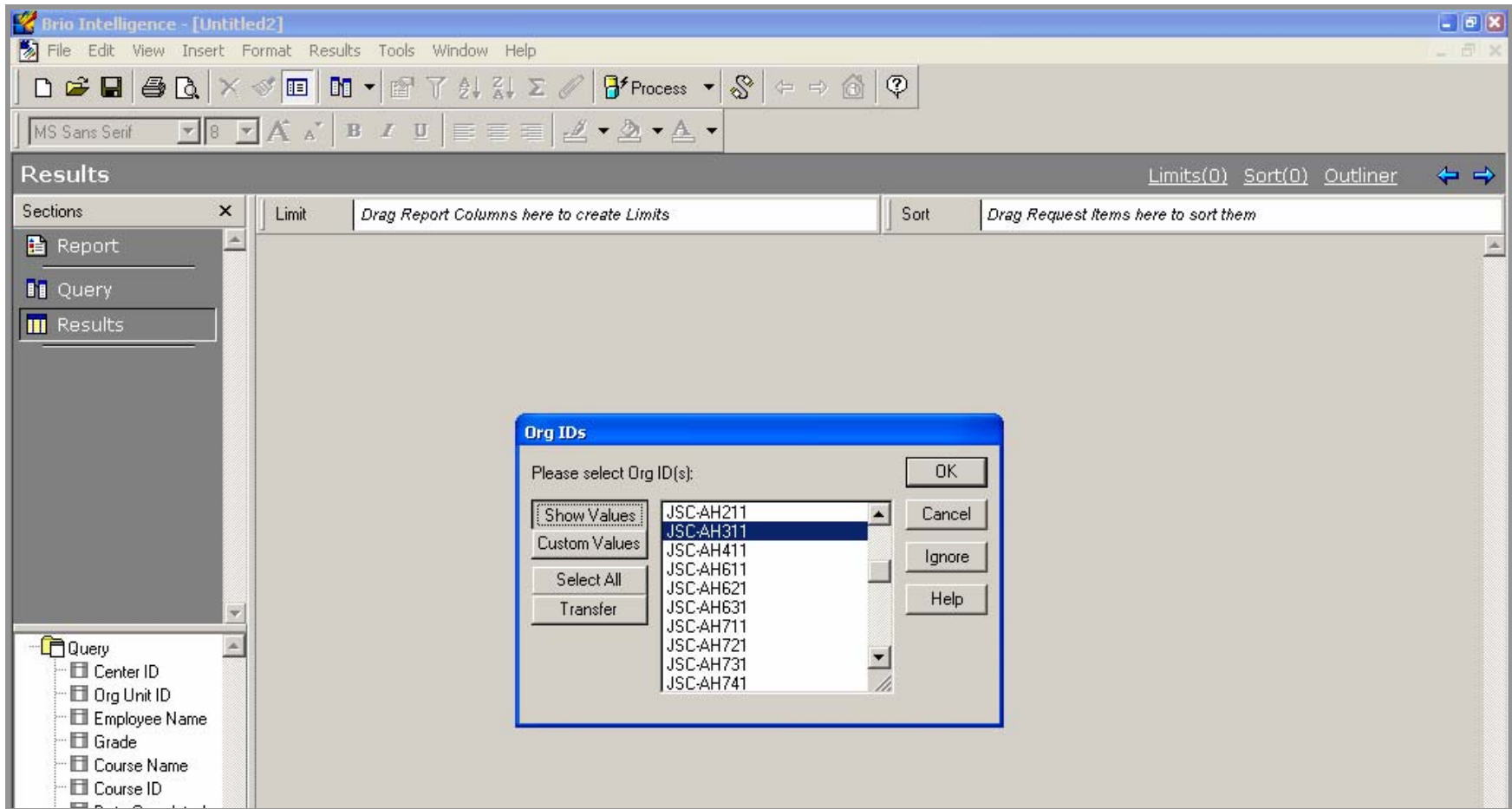 - Click **Select All**.
  - Click **OK**.
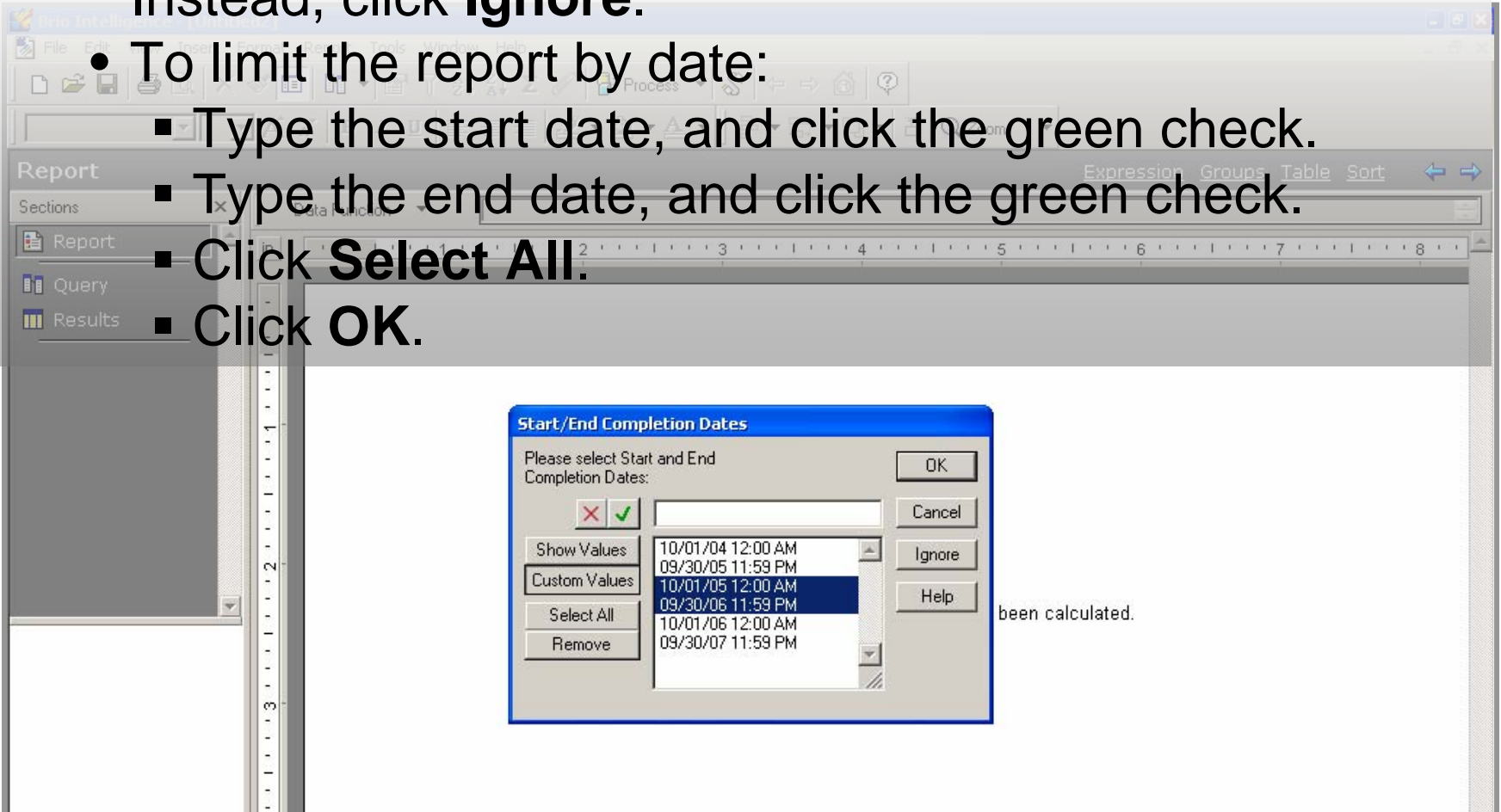
Step 7: Click **Results** to see the results in a table.

To export the data to Excel:
Click on **File > Export > Section**

Then, name and **Save** the file…

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Exercise 2:

Saving a Report in Brio

Step 1: Click **File > Save Options > Save Query Results With Document** to save both the query and the results.

Step 2: Check the boxes for both **Query and Results.** Click **OK.**

Step 3: Click **File > Save As…**
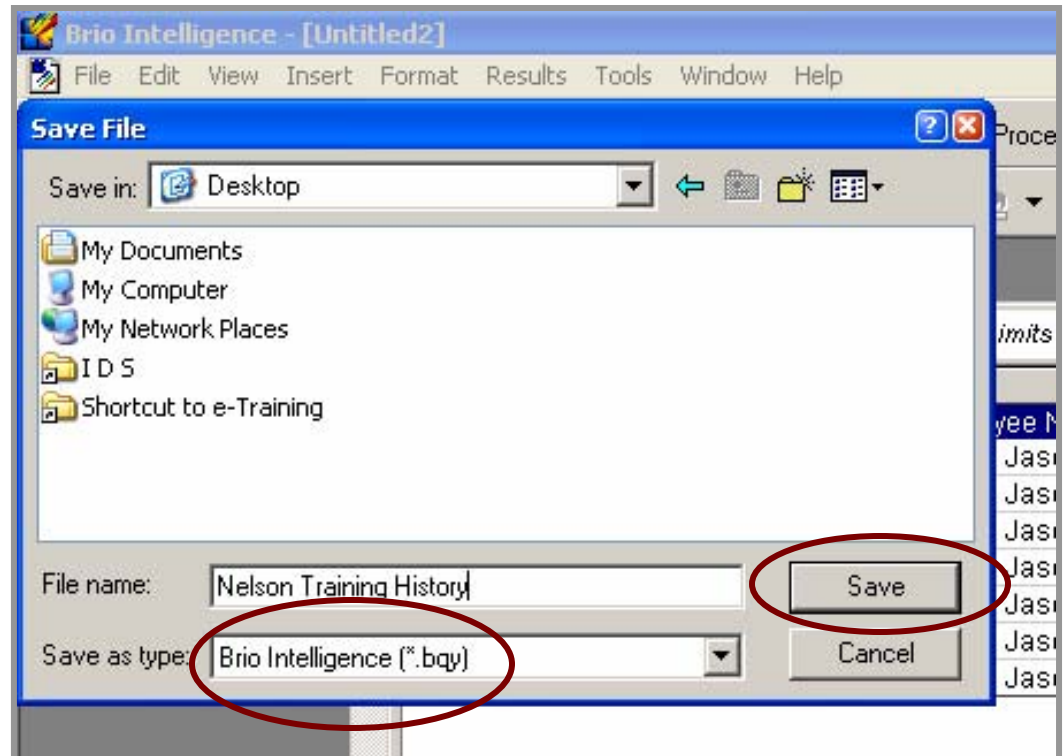
Then, name and **Save** file
as a (*.bqy) type.

Step 1: Click on **Process pull down menu** and select **Process All.**

Step 2: Select your Domain ID. Click OK.
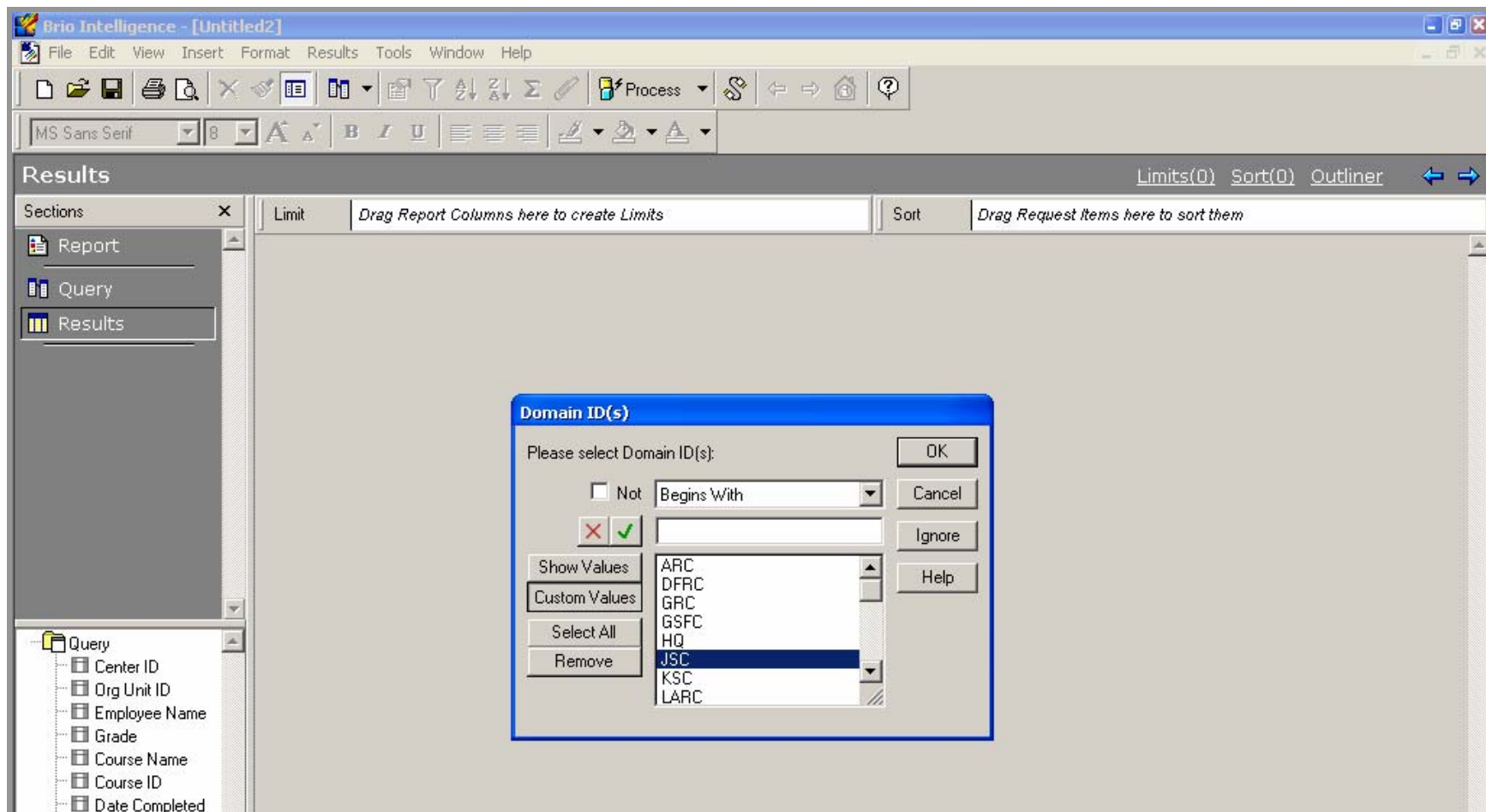
Step 3: Select Start/End Completion Dates.

- To get a complete history, do not enter any dates. Instead, click **Ignore**.
- To limit the report by date:
  - Type the start date, and click the green check.
  - Type the end date, and click the green check.
  - Click **Select All**. Click **OK**.
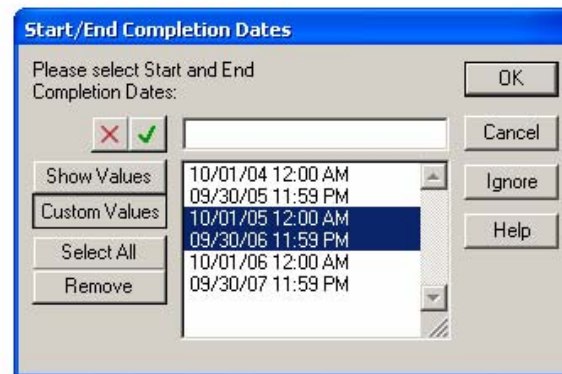
Step 4: Click **Ignore** for the Training Type SubCode for both Component and Schedule.
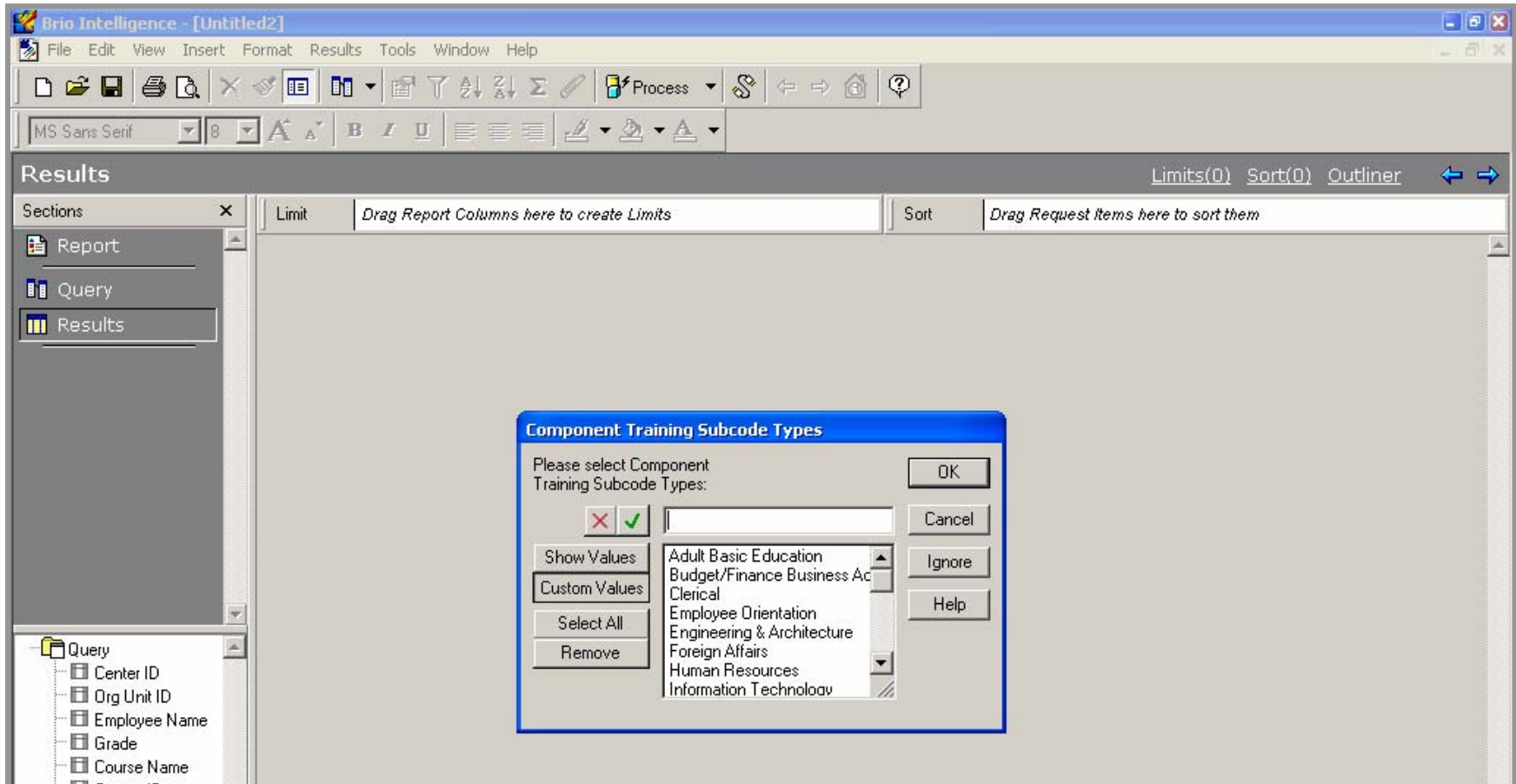
Step 5: Click **Show Values** to see a list of Org ID's. Select the Org ID, and click **OK**.

Step 6: Click **Results** to see the results in a table.

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Exercise 4:

Limiting and Sorting

How to Limit Data

Let's use limits to determine who in JSC-AH3 has taken the following courses:

- Basic IT Security for 2006

- Root Cause Analysis

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Step 1: Click and drag the Course Name column to the Limit field.

Step 2: Click **Show Values**
- Hold the **CTRL** key while selecting the courses from the list.
- Once you have selected all of the courses, click **OK**.

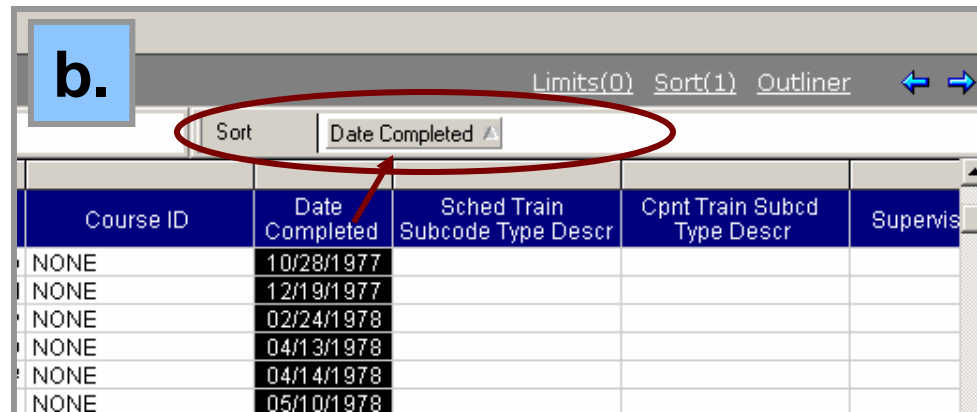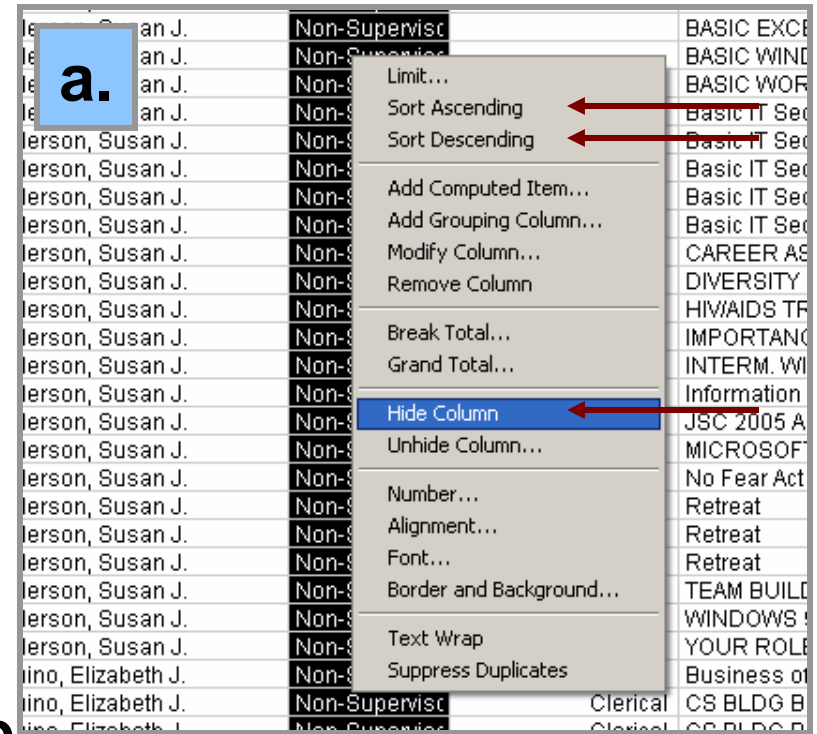# The **Limit** function places a filter on the results.

2 Ways to Sort Data:

a. Right click on a column to:

- Sort Ascending
- Sort Descending
- Hide column

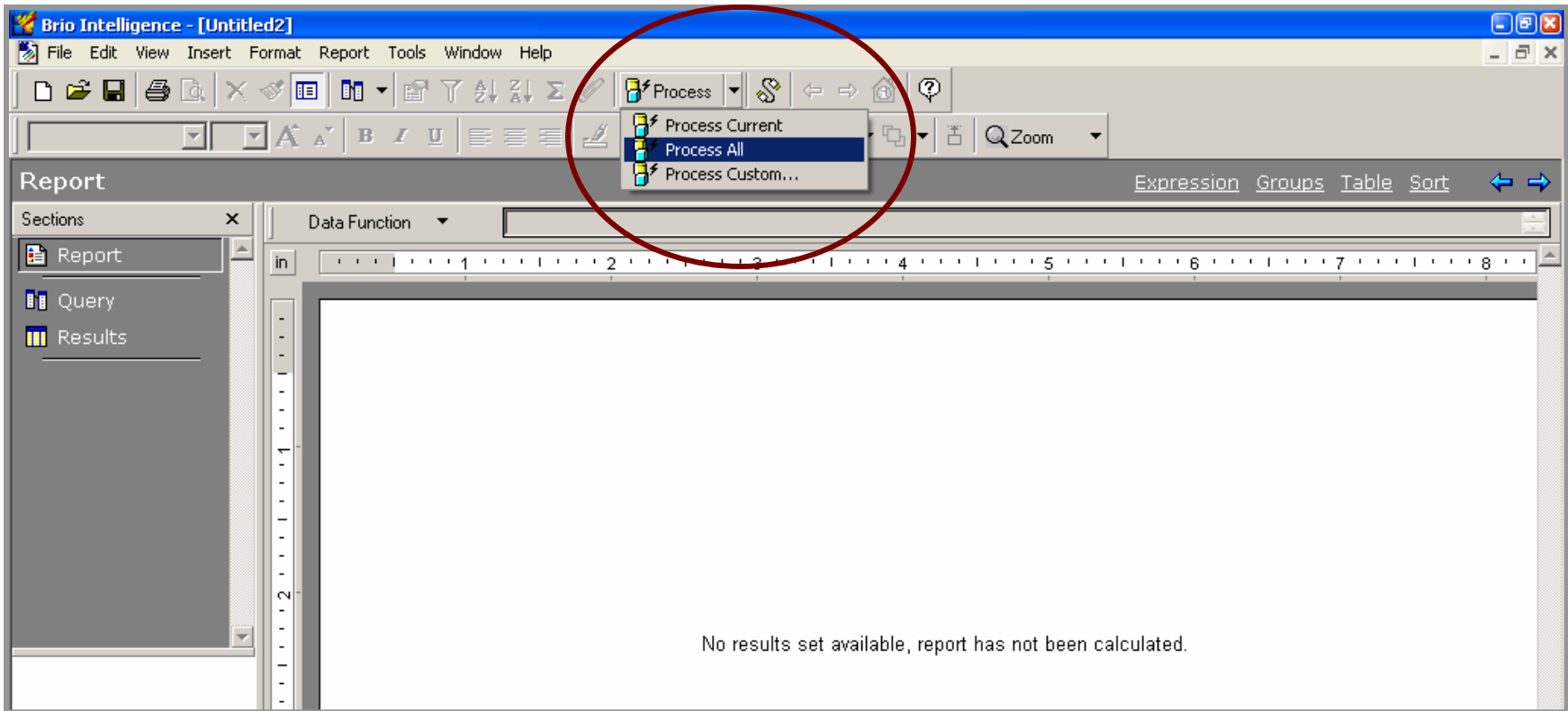**Or**

b. click and drag a column the Sort field:

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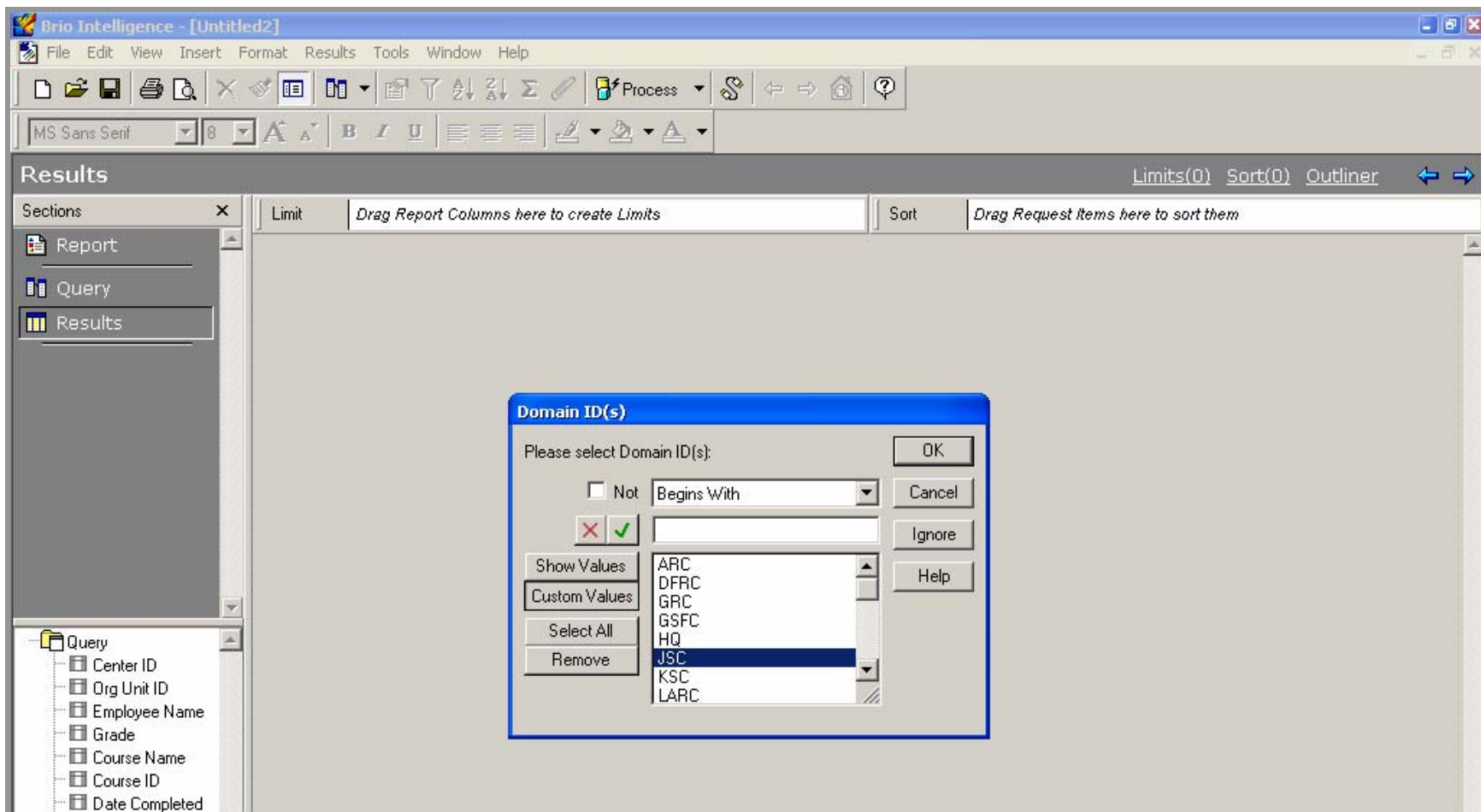**System for Administration, Training, and Educational Resources for NASA**

Exercise 5:

History Export

Step 1: Click on **Process pull down menu** and select **Process All.**

Step 2: Select your Domain ID. Click OK.

Step 3: Excluded Org IDs, Click OK.
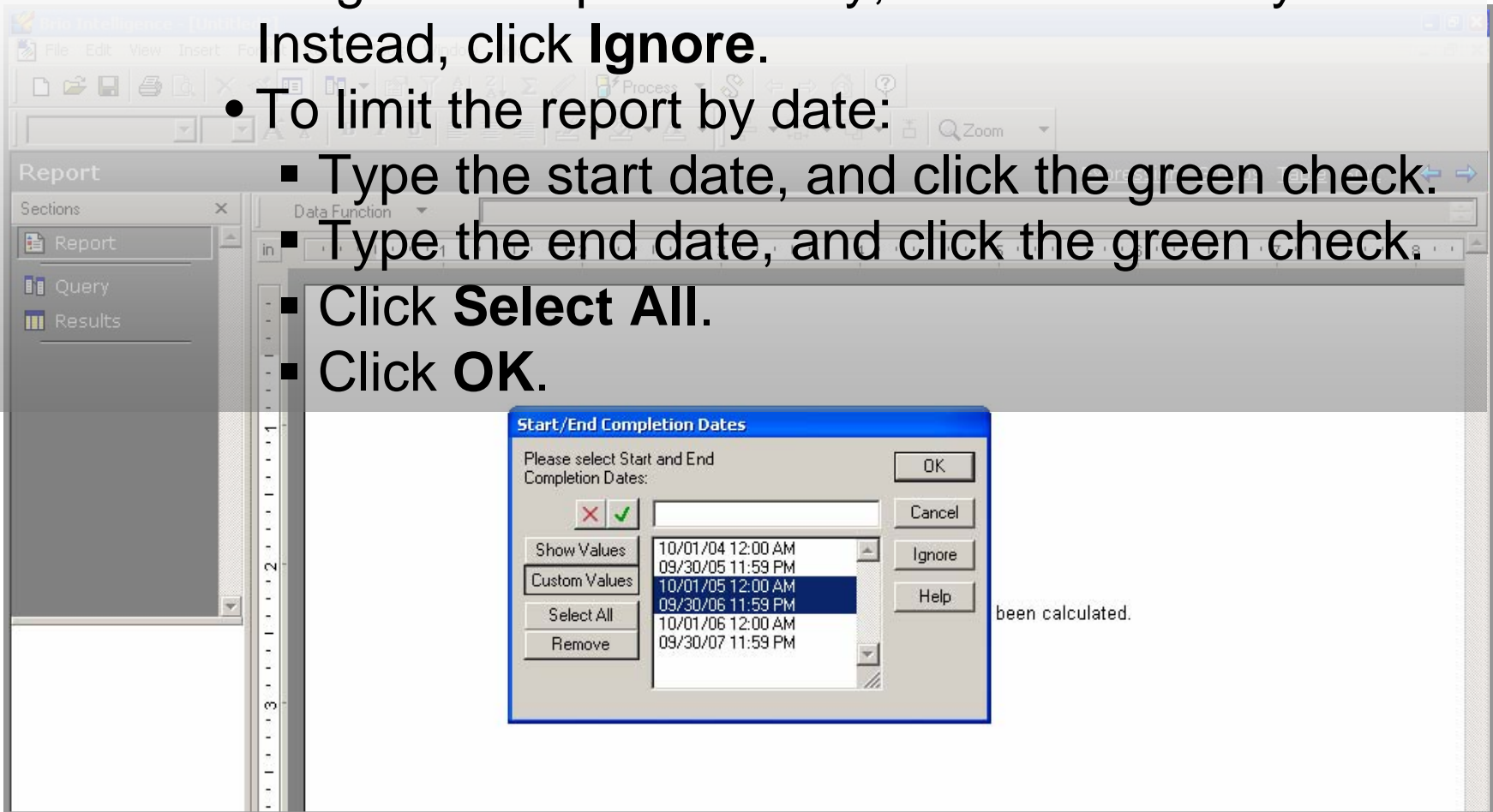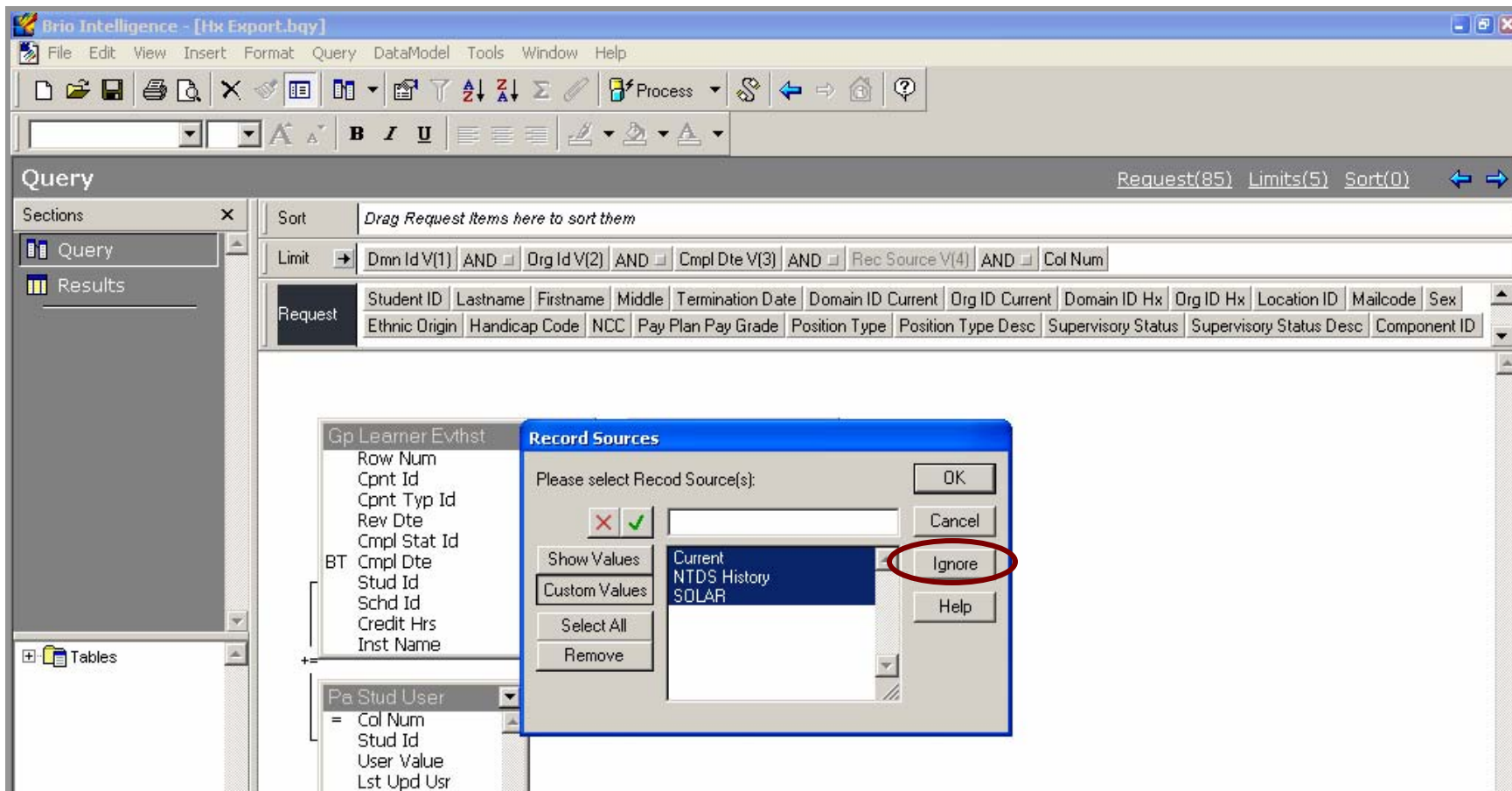
Step 4: Select Start/End Completion Dates.

- To get a complete history, do not enter any dates. Instead, click **Ignore**.
- To limit the report by date:
  - Type the start date, and click the green check.
  - Type the end date, and click the green check.
  - Click **Select All**.
  - Click **OK**.

Step 5: Click **Ignore**.

Step 6: Click **Outliner** to view all data fields in the report. Re-order columns by clicking the field and dragging to the desired position.

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Exercise 6:

Pivot Tables

Step 1: Click **Insert** > **New Pivot**

Step 2: Drag and drop data elements you want to report on into the **Side Labels** field.
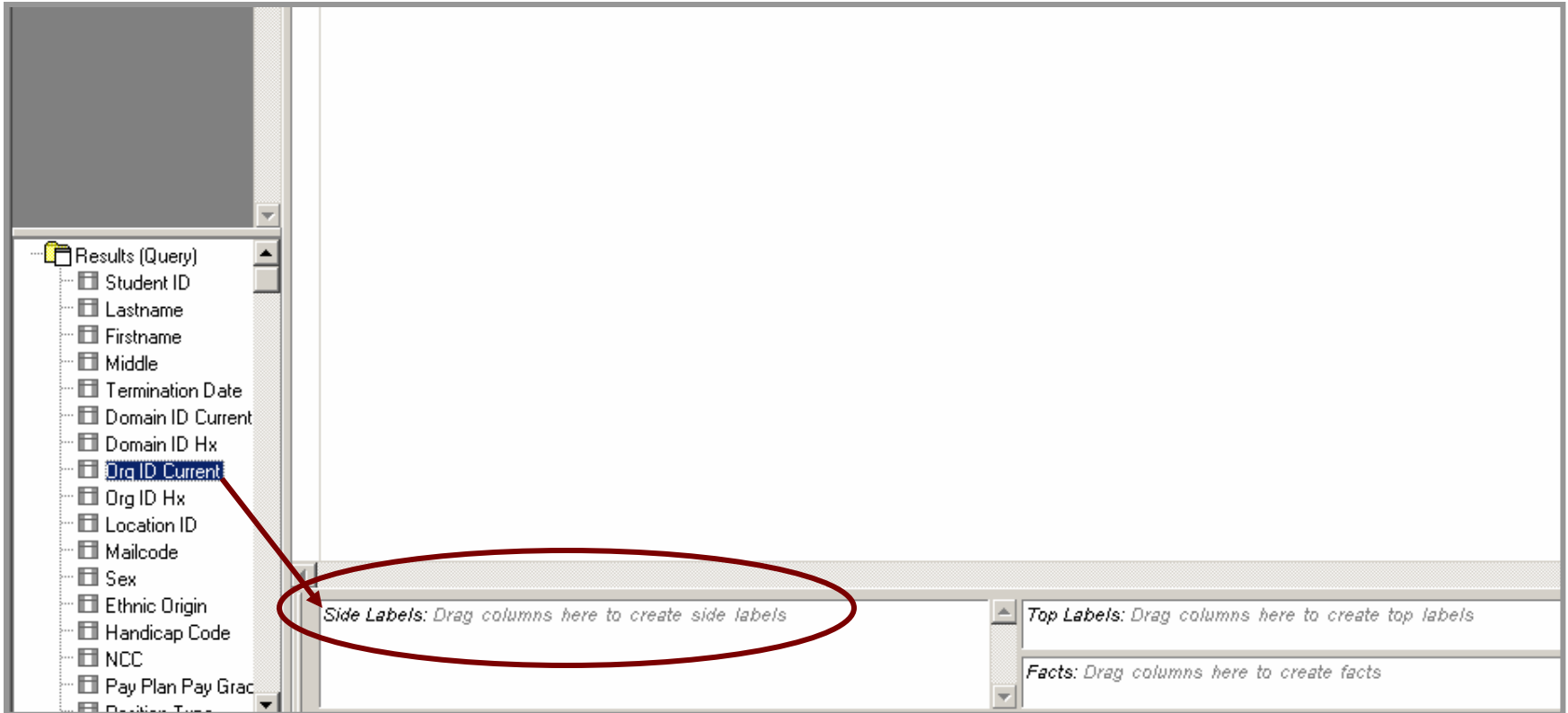
Step 3: Click and drag data elements to the **Facts** field to perform sum and other math functions.

In this example, we used a pivot table to determine total training expenditures by Org ID.

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Exercise 7:

Charting and Graphing

Step 1: To graph the pivot table, click **Insert** > **Chart This Pivot**.

Results:

Step 2: Choose how to display information.
Change the bar graph into a pie chart.

Piece of cake! Or should I say, "piece of pie!"

To create a custom chart/graph,
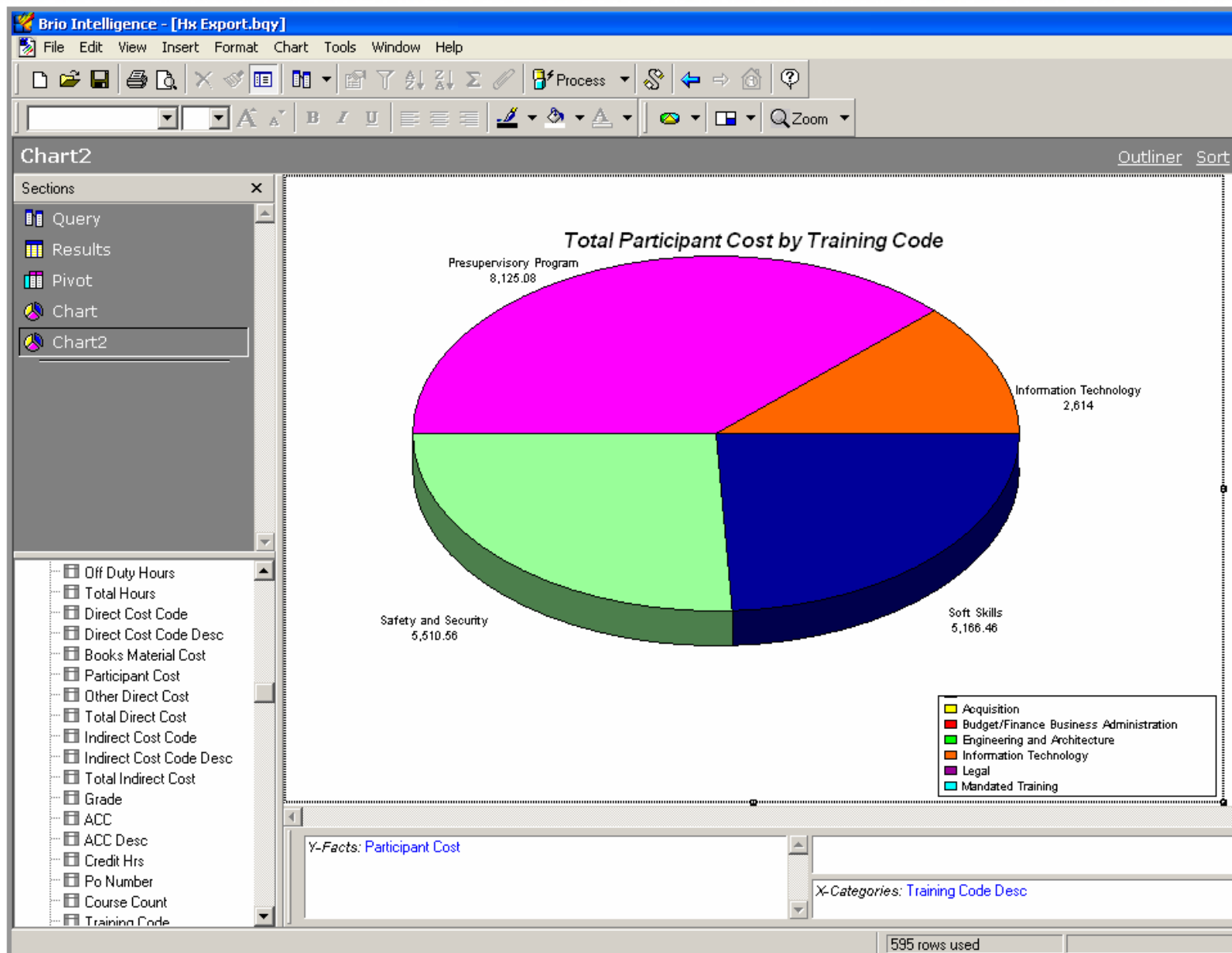## Step 1: Click **Insert > New Chart.**

Step 2: Click and drag the data elements to the X and Y axes.

In this example, we will created a pie chart to determine **Participant Cost** (Y) by **Training Type SubCode** (X).

Other Useful Reports

- Agency Sum of Comp Training
- Agency PW Training Instances
- Participant List by Course

Questions?